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Market Development Reports

Hong Kong Fruit Juice Product Brief

1999

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Report Highlights:

In Hong Kong there are more than thirty local and foreign suppliers competing in the small and declining fruit juice market. Despite undesirable market sentiments, foreign suppliers have gained market shares at the expense of local producers. This is because the demand for pure juice has increased while the market share of juice drinks has declined.

Since the overall fruit juice market is not expected to grow in the near term, enhancing market share can only be achieved through the reduction of local product supply. Marketing and promotion should focus on the quality and advantages of fresh juices, as local producers do not produce juices directly from fruits.

Includes PSD changes: No
Includes Trade Matrix: No
Unscheduled Report
Hong Kong [HK1], HK

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Introduction

The goal of this report is to provide a brief on the fruit juice market in Hong Kong, as well as future developments. Eastern Strategic Consultants utilized a combination of primary and secondary sources of information, intelligence, and insight to document this study.

For Hong Kong dollar currency figures, the exchange rate used is US$1 = HK$7.78.

Main Findings

In Hong Kong there are more than thirty local and foreign suppliers competing in the small and declining fruit juice market. Despite undesirable market sentiments, foreign suppliers have gained market shares at the expense of local producers. This is because the demand for pure juice has increased while the market share of juice drinks has declined.

Most foreign imports, specifically American imports, are regarded by the Hong Kong consumers as high quality products, which is a favourable perception which American fruit juice suppliers should leverage to further expand their market shares.

Since the overall fruit juice market is not expected to grow in the near term, enhancing market share can only be achieved through the reduction of local product supply. Marketing and promotion should focus on the quality and advantages of fresh juices, as local producers do not produce juices directly from fruits.

Market Access Statement

LABELING REQUIREMENTS

The Food and Drugs (Composition and Labeling) Regulations require food manufacturers and packers to label their products in a prescribed, uniform and legible manner. The following information is required to be marked on the label of all prepackaged food except for 'exempted items' as provided in the Regulations. Prepackaged food means any food packaged in such a way that the contents cannot be altered without opening or changing packaging and the food is ready for presentation to the ultimate consumer or a catering establishment as a single food item.

1 Name of the Food

a) Prepackaged food shall be legibly marked or labeled with its name or designation.
b) The food name should not be false, misleading or deceptive but should serve to make

the nature and type of food known to the purchasers.

2 List of Ingredients

a) Preceded by an appropriate heading consisting of the words " ingredients", "composition", "contents" or words of similar meaning, the ingredients should be listed in descending order of weight or volume determined as at the time of their use when the food was packaged.

b) If an additive constitutes one of the ingredients of a food, it should be listed by its specific name or by the appropriate category (e.g. Preservative, artificial sweetener, etc.) Or by both name and category.

3) Indication of "best before" or "use by" date

Prepackaged food shall be legibly marked or labeled with the appropriate durability indication as follows:

a) a "best before" (in Chinese characters as well) date; and

b) in the case of a prepackaged food which, from the microbiological point of view, is highly perishable and is likely, after a short period, to constitute an immediate danger to human health, a " use by" (in Chinese characters as well) date.

The words "use by" and "best before" in English lettering and Chinese characters followed by the date up to which specific properties of the food can be retained, to indicate the shelf life of the food. The "use by" or "best before" date should be shown either in Arabic numerals in the order of day, month and year (or month and year in certain circumstances) or in both the English and Chinese languages. For specific details refer to the Regulation.

4) Statement of Special Conditions for Storage or Instruction for Use

If special conditions are required for storage to retain the quality or special instructions are needed for prepackaged food use, a statement should be legibly marked on the label.

5) Name and Address of Manufacturer or Packer

Prepackaged food shall be legibly marked or labeled with the full name and address of the manufacturer or packer, except under the following situations:

a) The package is marked with an indication of the country of origin and the name and address of the distributor or brand owner in Hong Kong, and the address of the manufacturer or packer of the food in its country of origin has been notified in writing to the Director of Health.

b) The package is marked or labeled with an indication of its country of origin and with a code marking identifying the manufacturer or packer in that country and particulars of the code marking and of the manufacturer have been notified in writing to the Director of Health.

6) Count, Weight or Volume

The food label should include the numerical count or net weight or net volume of the food.

7) Appropriate Language

The marking or labeling of prepackaged food can be in either the English or the Chinese language or in both languages. If both the English and Chinese languages are used in the labeling or marking of prepackaged food, the name of the food and the list of ingredients shall appear in both languages.

Exempt from labeling regulations: Individually wrapped confectionery products and preserved fruits intended for sale as a single item; Prepackaged foods for sale to catering establishment for immediate consumption and those containing more than 1.2 percent alcohol by volume.

Under the amended Food and Drugs (Composition and Labeling) Regulations, it is an offence to sell any food after its "use by" date. Furthermore, any person who, not being the food manufacturer or packer or without their written authorization, removes or obliterates any particulars on the label required under these regulations also commits an offence.

IMPORT DUTIES

Hong Kong is a free port which does not impose any import tariffs on products with the exception of four dutiable products: liquor, tobacco products, hydrocarbon oils and methyl alcohol. Local importers have to apply for a licence from the Hong Kong Customs and Excise Department for the importation of dutiable commodities. In addition, a licenced importer has to apply for a permit for each and every consignment.
The current duties are as follows:

Cigarettes per 1000 sticks	US$98.45
Cigars per kg	US$126.74

Beer & liquor with less than 30% alcohol : 30%
Liquor with more than 30% alcohol : 100%
All wines: 60%

The fruit juice market has been gradually declining over the past five years. It remained flat in 1997.

C As the fruit juice market is affected by demand for health drinks and mineral water, which are both growing in Hong Kong, significant growth is not expected in the near term

On the other hand, import consumption has been increasing, with products from the USA and Australia dominating the market.

C As imported juices are regarded as high quality, more consumers are switching from locally produced juice drinks

Orange, apple, and mix non-citrus juices are most popular in the Hong Kong market.

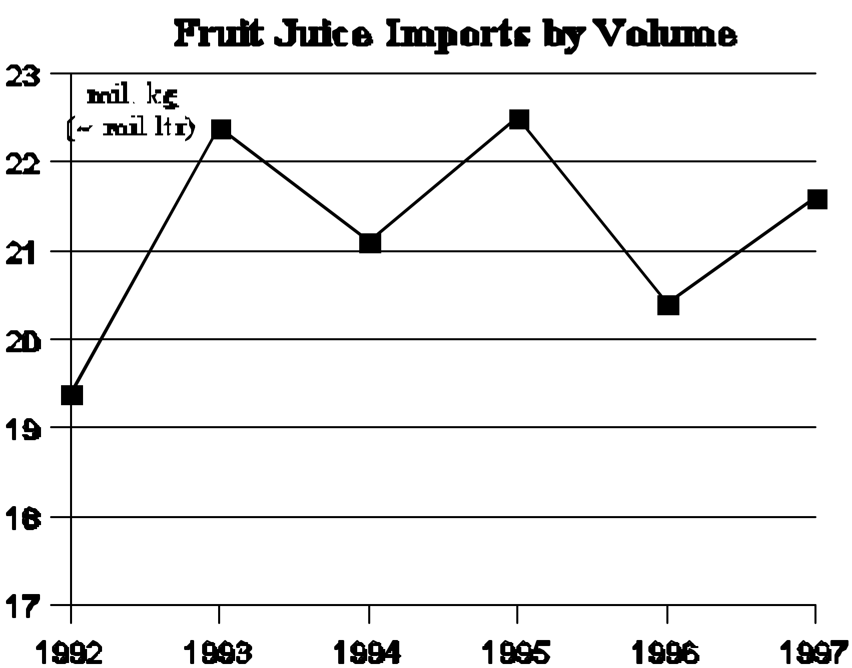
C However, mix of citrus and non-citrus juices are presently not available in the market, which is a 'vacant spot' where potential opportunities may lie

Despite limited parallel imports for fruit juices, competition remains severe in both refrigerated and non-refrigerated categories. As a consequence, profit margins have been declining(although the decline is not as severe as in other soft drinks).

Imports of fruit juice into Hong Kong have remained stagnant over the past 5 years, with a slightly decreasing trend(4-5%)in 1996-97 as compared to 1994-95.
C Import pattern has been irregular, with volume fluctuating around +5% from 21 million kg (this approximately equals 21 million liters).
C Declining local fruit juice consumption affected overall imports in 1997

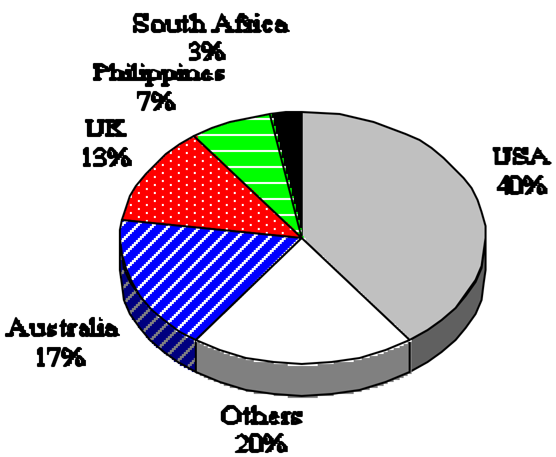
Import value however, has shown slight increases in 1996-97 as compared to 1994-95, with an increase of 6-7% over 3 years.
C The rate of increase is considered as marginal as Hong Kong's rate of inflation is much higher

The market is expecting imports to be sustained within the fluctuation rate of +5%, but the overall trend is expected to be gradually downward.

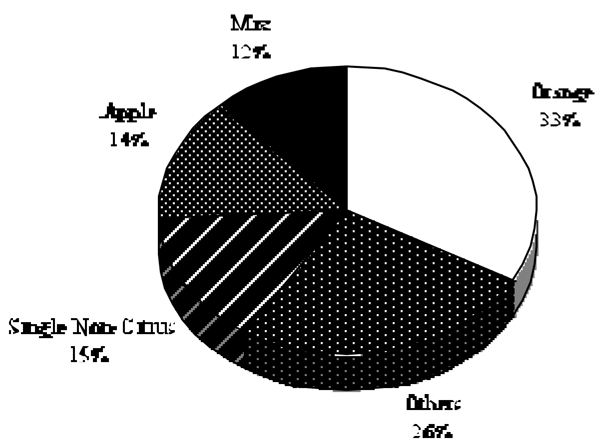


US is the largest supplier of fruit juice into the Hong Kong market.
- US maintained a 40% import share in 1997, a drop of more than 10% from 1994-95 when the US share was nearly 50%.
  -- The largest supplier is Tropicana. Others include Dole, Welch's, S&W, Del Monte, etc.
- Australia and UK are the two other important suppliers, with import shares increasing by 8% and 12%, respectively from 1992-97. Together they accounted for more than 30% of imports
  -- Major brands include Popper and Berri

Orange juice has by far the largest import share, at more than 30% of the total, followed by apple juice(14%), other non-citrus juice(15%), and mixtures of fruit and vegetable juices(12%)
- Other types of fruit juice (tomato, grape, pineapple, etc.) imports are rather evenly spread, at 5-6% each



Fruit Juice Imports by Country 1997



Import Segmentation by Juice Type

Re-exports of fruit juice declined from 1993 to 1995(~30% down), and increased by more than 20% in 1996-97

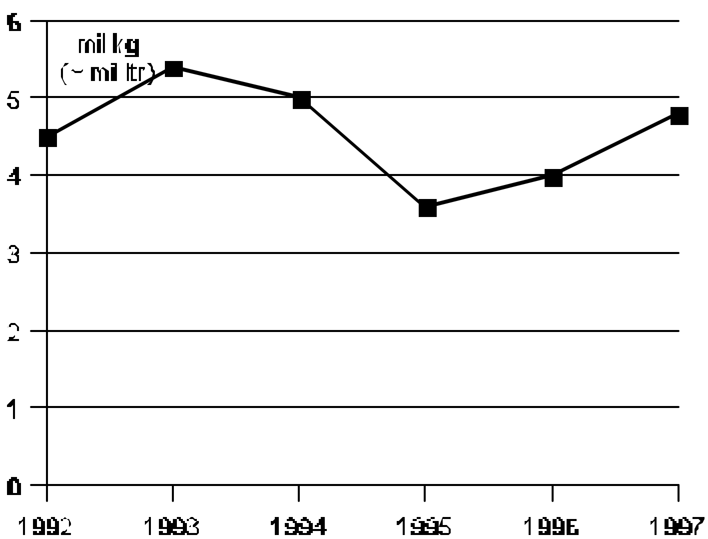
C As local demand gradually decreased in 1993-94, regional distribution, especially re-exports to the Philippines, increased in order to balance the amounts of imports(re-exports to the Philippines in 1994 rose to 12% of total re-exports from 2% in 1992)

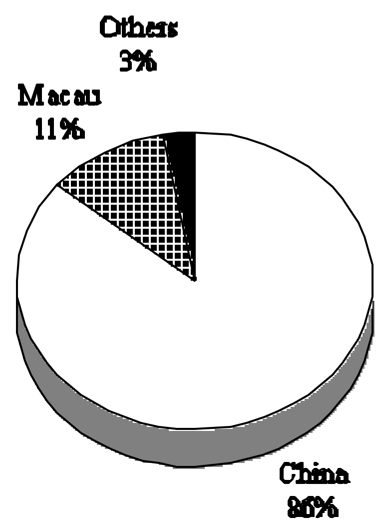
C Re-exports to the Philippines vastly declined in 1996-97 as import consumption stabilize

As good quality fruit juice is not being manufactured in China and Macau, Hong Kong has been serving as the transhipment point for Western fruit juice imports.

C As regional distribution activities decline in 1996-97, and China's premium fruit juice demand has greatly increased, the vast majority of re-exports have been channelled into China and Macau(over 95%) in 1996-97

Fruit Juice Re-Exports by Volume





Fruit Juice Re-Exports by Destination

As Hong Kong does not produce pure fruit juices, domestic exports only juice drinks (from concentrates) with relatively low fruit juice percentage.

The quantity of domestic export is very insignificant, at about 0.5% of import volume.

C All domestic exports are to China and Macau

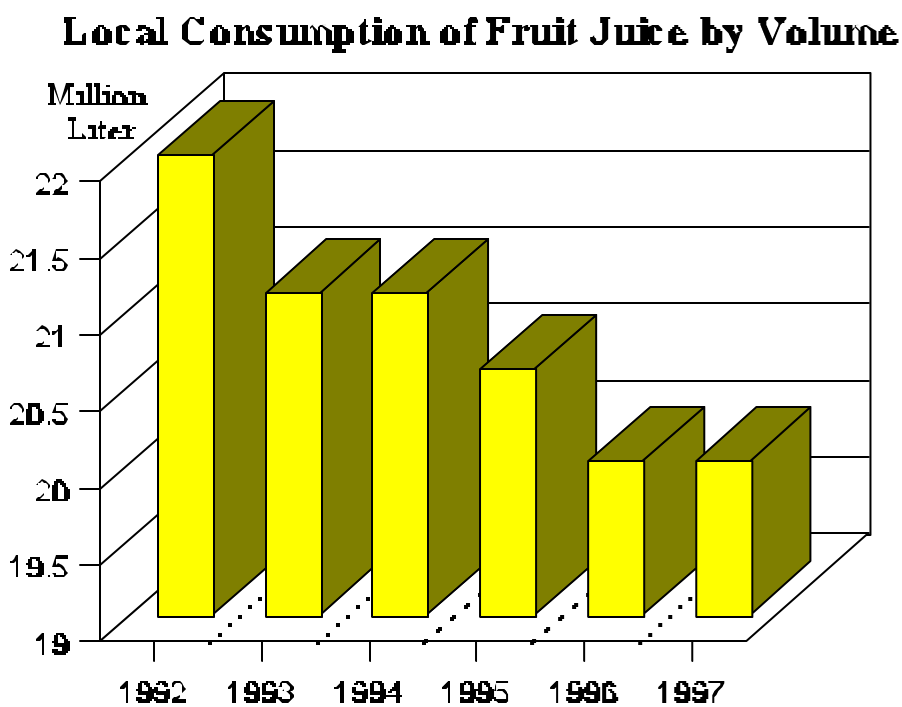
C Products are orange and apple juice drinks, and juice drinks of fruit mixtures

For the rest of this report, Eastern Strategic will assume that domestic export will have no impact on the local fruit juice market.

Hong Kong's market for fruit juice is flat, with local consumption slightly declining.
- C The overall consumption has decreased by over 10% from 1992-97 due to severe competition from other soft drinks
- C The outlook is a further decline of 3-5% by 1999

Fruit juice demand in 1997 was about 20 million liters, down from 22 million liters in 1992

Imports accounted for about 75% of local consumption, which has grown by 15% from 60% in 1992.
- C The reason is the market share decline of locally produced juice drink, being replaced by higher-end imported fruit juices
- C Despite the flat and declining, and very competitive market, foreign juices, could still gain market share



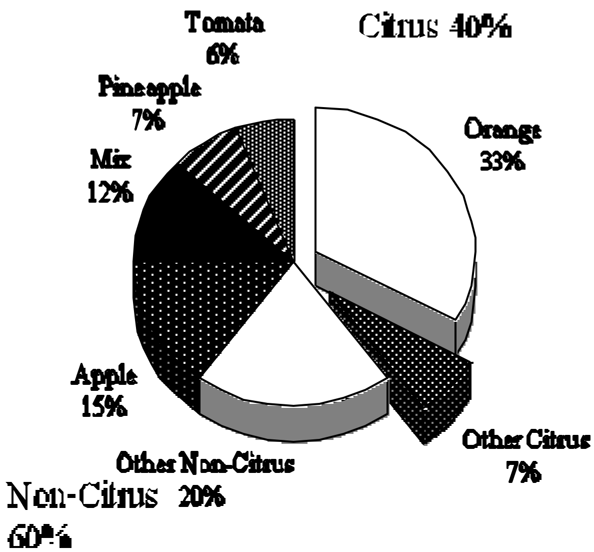
Orange juice is by far the most popular single fruit juice in the Hong Kong market.
- C The other citrus fruit that is relatively popular is grapefruit
- C Other citrus juices are not commonly seen

Non-citrus juices are popular among the consumers, with a ratio of 60:40% over citrus juices
- C Apple juice and mix juices are among highest in sales volume
- C Pineapple and tomato juices have similar market share of 6 to 7% each

There appears to be a 'vacuum spot' in the market because no citrus & non-citrus mix juices are available

Juice Type	**Market Share (%)**	
Citrus Orange	33	Total Citrus 40%
Others	7	
Non-Citrus Apple	15	Total Non-Citrus 60%
Pineapple	7	
Tomato	6	
Other non-citrus	20	
Mix Juices	12	

Total	100	100%


Tomato
6%
Citrus 40%
Pineapple
7%
Orange
33%
Mix
12%
Apple
15%
Other Citrus
7%
Other Non-Citrus
20%
Non-Citrus
60%

Fruit juices are separated into refrigerated and non-refrigerated products, with a ratio of about 30:70%, respectively.

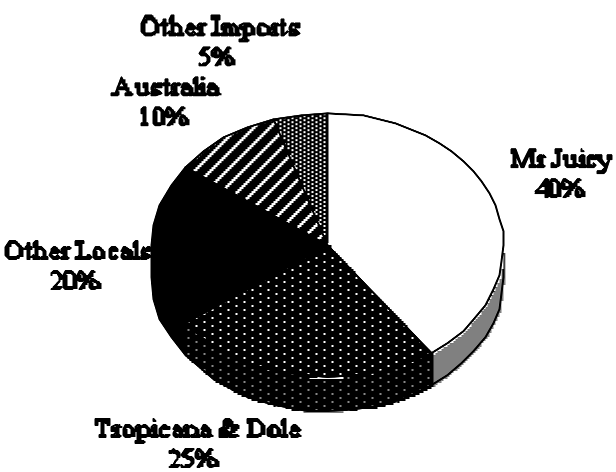
- Refrigerated juices are mostly fresh juice products with high concentration of pure juice(with the exception of Mr Juicy, the market leader, with less than 50% juice content)
- Non-refrigerated juice is further divided into fruit juice and juice drink, each with about equal market share

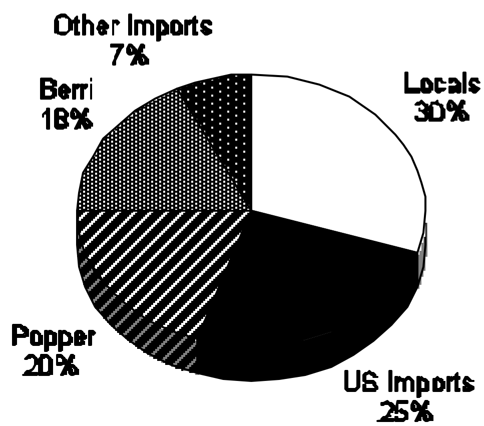
Product Category	Major Brands	Historical Growth	Outlook (1998-2000)	Comments
Refrigerated	C Mr Juicy C Big Squeeze C Tropicana C Dole C Australian Fresh C Sunrasia C Sunkist	- Overall growing segment with increasing competition from imports offering better quality products - Local products market share had fallen	C Local products share continue to decline C Overall segment remains flat	- Mr Juicy is by far the leader - US imports should secure better market share if priced competitively - Target on retail sales only
Non-refrigerated	C Popper C Berri C Glenpark C S&W C Mr Juicy C Welch C Tree Top C Del Monte C Campbell	- Segment market share remains flat - Less competitive as most brands do not market aggressively, except Popper and Berri	C Segment remains flat	- Popper and Berri are market leaders - Local products not expected to improve performance - Strong in foodservice sector, especially like S&W

Overall Fruit Juice Market Segmentation by Brand and Product Type (Retail segment only)

Total Fruit Juices

Brand	Market Share(%)	Brand	Market Share(%)
30% Refrigerated Juices		**70%** Non-Refrigerated Juices	
Mr Juicy	40	Popper	20
Other Locals	20	Berri	18
Tropicana and Dole	25	US Imports	25
Australian	10	Other Imports	7
Other Imports	5	Locals(Vita, Sunfill, Hi-C)	30
Total	100%	Total	100%





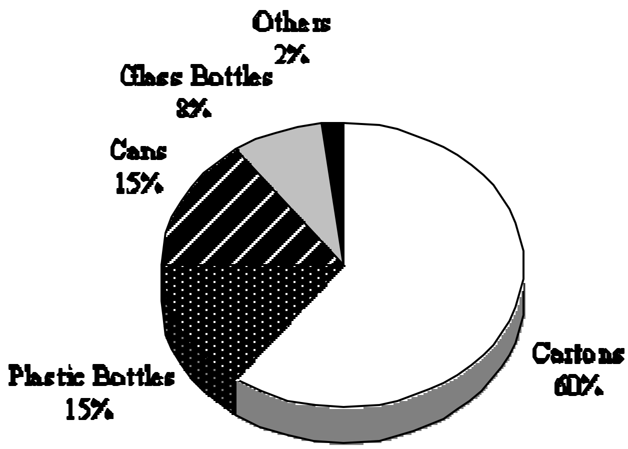
Paper carton is by far the most popular type of packaging for fruit juices (overall about 70%).
C More than 70% of cartons are by Tetra Pak
-- Berri, Glenpark, Mr Juicy, Tree Top, and Park N Shop brands use Combibloc packaging (about 30%)
C Cartons are popular in both product categories, especially so in the non-refrigerated sector
-- As Mr Juicy comes in a large volume plastic bottle, carton packaging is becoming less important in the refrigerated segment

Cans are popular among US brands(Del Monte, Campbell) in the non-refrigerated segment (overall about 15%).

Certain imports like Sunrasia use glass bottles(overall about 8%).

Plastic bottles are used mostly by local producers and Sunkist (overall about 15%).

Other packaging are rare (1-2%)
C 'Capri-Sonne'(from Indonesia) use foil pouches

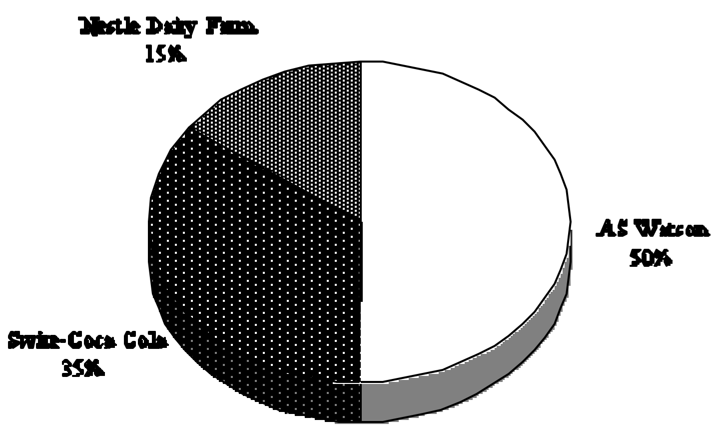


- # In the Hong Kong market, supply of fruit juice is about 70%:30% from imports and local production, respectively.

- # Local production of juice drinks amounted to approximately 6 million liters (including negligible amount of domestic exports).
  - C Citrus Growers, a member of AS Watson, is the largest producer(Mr Juicy & Ripe)
  - C Others include Nestle Dairy Farm(Big Squeeze), and Swire-Coca Cola(Sunfill, Hi-C)

- # As local products are expected to further decline in market share, coupled with limited potential for domestic exports, local production should decline in the near term.

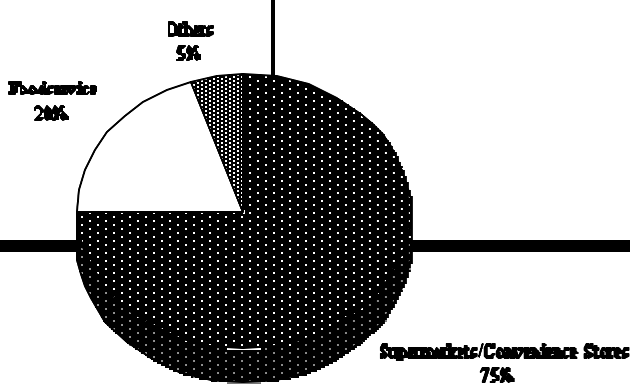
Company	Production Share (%)
Citrus Growers(Watson)	50
Swire-Coca Cola	35
Nestle Dairy Farm	15
Total	100%



Fruit juices are distributed in Hong Kong through three channels:
- Supermarkets and convenience stores(department stores, chain supermarkets, 7-11 and Circle K)
- Foodservice sector(hotels, restaurants, pubs/bars/clubs, airline catering)
- Others(road-side stores, hawkers/food centres, school and company canteen, vending machines, etc.)

Perceptions on each channel is different.
- Supermarkets and convenience stores have the largest market distribution share, and their share is expected to maintain or increase in 1998, and stabilize in 1999-2000.
  -- The above retail sector markets both refrigerated and non-refrigerated juices at an overall ratio of about 30:70%, respectively
- 1998 is not expected to be a good year for the foodservice sector. With more consolidation occurring, distribution share is expected to decrease
  -- Non-refrigerated juices dominated the foodservice sector(consumption~20% of total) with refrigerated juices almost non-existence
- Unlike other soft drinks, other channels are not significant distribution channels for fruit juices

Distribution Channel	Relative Market Share (%)
Supermarkets/convenience stores	75
Foodservice	20
Others	5
Total	100 %



Fruit Juice Distribution Channels

Key Distributors and Manufacturers of Major Fruit Juice Brands in Hong Kong

Brand	Production Origin	Local Distributor	Market Positioning/Comments
Mr Juicy Ripe	Local (AS Watson)	AS Watson	Strong in retail (Park N Shop) but relatively weak in foodservice
Big Squeeze	Nestle Dairy Farm	Dairy Farm Int'l	Strong in retail
Tropicana	USA	Tropicana Beverage HK	Strong in retail
Dole	USA	---	Moderately successful in both retail and foodservice
Vita	Local (Vitasoy)	Vitasoy	Strong in retail but inactive in foodservice
Sunfill Hi-C	Local (Swire-Coca Cola)	Swire Trading	Strong in retail
Popper	Australia	Sims Trading	Strong in retail
Berri	Australia	---	Strong in retail
Sunrasia	Australia	---	Aggressively promoting in past year
Del Monte	USA	Kikkoman (HK)	Strong in both retail and foodservice
Welch's	USA	Welch's HK	Strong in retail
S&W	USA	Inchape	Strong in foodservice
Pokka	Singapore	Four Seas Mercantile	Strong in retail

The retail sector includes large-scale department stores, chain supermarkets, and convenience stores.

Segment	Key Players	Market Positioning and Comments
Department Stores	C Hong Kong Seibu C Jusco C Sogo C Yaohan (presently closed)	C Important segment in this channel C Market share remain consistent
Chain Supermarkets	C Wellcome C Park N Shop C Seven Eleven C Dah Chong Hong	C Most important segment in this channel C Largely take-home purchases C Wellcome and Park N Shop are serious competitors, and have similar market share. Together they constitute to majority (~75%) in this sector C General strategy is to expand market reach by increased number of outlets
Convenience Stores	C Seven-Eleven C Circle K	C Largely impulse purchases C Consistently improving market share in past 5 years C Not significant for fruit juice distribution

Segment	Players	Market Positioning	Outlook
Restaurants	C Big restaurants like Dun Wong, Palace, Hanbo,etc. C Presently Hong Kong has over 10,000 restaurants	- Declining overall business in 1997of 30-40% affecting beer sales - Many restaurants have closed by the end of 1997	- Undesirable market sentiments likely to continue in 1998, expecting recovery in 1999 - Reducing role in beer distribution
Pubs	C Individual pubs located in various districts like Lan Kwai Fong, Wanchai, etc.		
Nightclubs and Karaokes	C Upmarket clubs like Boss, China City, Metropolitan. C Smaller clubs located in Wanchai, Mongkok, andTsim Sha Tsui		- Undesirable market sentiments in 1998
Hotels	C Presently total more than 1500 in Hong Kong, including over 120 3, 4, and 5-star hotels		- Undesirable market sentiments in 1998

A&W is a leading food service sector supplier importing fresh juice from Australia and repackaging in Hong Kong, i.e. pineapple, orange, apple, blackcurrant, grapefruit, others.

Packaging and pricing of fruit juices in Hong Kong retail market is as follows (prices indicated lowest retail pricing):

Refrigerated Fruit Juices (except last 3 items)			Non-Refrigerated Fruit Juices		
Brand	**Product**	**Price(HK$)**	**Brand**	**Product**	**Price(HK$)**
Mr Juicy	0.5 L plastic bottle	11.2	Top Fruit (various)	1L carton	10.9
	1L carton	20.1	Popper (various)	250ml carton(x6)	3.5 (24.5)
	1.89 L carton	29.8		1L carton	13.5
Tropicana	250ml carton	6.6	Popper Junior	8x 100ml carton	22
	1L carton	24.8	Berri (various)	1L carton	11.9
	1.75 L carton	38.9	Green Spot (orange)	250ml carton	3
Dole	1L carton	18.4	Sunkist (orange)	250ml carton	3
Sunkist	1L carton	22.8	Hi-C (orange)	250ml carton	3
	1.75 L carton	33	Vita (various)	6x250ml carton	12.9
Big Squeeze	220ml plastic bottle	4.3	Tree Top (apple)	162ml can	3.9
	2L plastic bottle	26.6	Campbell (Tomato)	163ml can	3.9
S&W (Tomato)	163ml can	2.8	Welch's (various)	340ml can	5.2
Tropico (various)	350ml can	4.9	Hyde Park (grapefruit)	1.36L can	14.8
Pokka (orange)	240ml can	4.2	Del Monte	1L can	11.7

Unlike soft drinks, fruit juices are not as heavily advertised in television.

C As their market shares are not as large, overall advertising budgets are smaller

In recent years imported fruit juices have been more aggressively advertised.

C Advertisements however, are done mostly on billboards and by offering discounts to retail outlets, and very seldomly on TV (except selected brands such as Mr. Juicy)

C Sunrasia has advertised on TV quite frequently over the past year, perhaps the only imported brand that does so

As for local brands, Mr Juicy has been constantly advertising on TV as well as other promotions through supermarket outlets

C Mr Juicy has been the most aggressively overall in all forms of advertisement

C The company (AS Watson) has been attempting to maintain market share through profit reduction and spending relatively large advertising budgets

C However, with increased competition from imports and the overall decreasing juice consumption, the effects of promotions have not been very desirable

The US Agricultural Trade Office in Hong Kong is available in offering help to American companies and their local distributors to more effectively promote the products by facilitating and organizing seminars, conferences, and introducing alliances.

Agricultural Trade Office
American Consulate General
18th Floor, St. John's Building
33 Garden Road
Hong Kong
Tel: (852) 2841-2350
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E-Mail: ATOHongKong@fas.usda.gov
Internet Homepage: http://www.usconsulate.org.hk

As Hong Kong is a free port, there is no import duty on beverages

However, other regulations apply, as follows:

C A health certificate from the country of origin must be obtained to certify that

-- The products were manufactured and packed under proper hygienic condition as approved by the origin country, and samples inspected by a method approved by that country.

The local health department will conduct sampling and analysis upon arrival of food and beverage shipments. Therefore appropriate correspondence between the importer and the health ministry is necessary.

Packaging requirements must comply with the HK Food and Drug Regulations, which includes proper labelling of item, ingredients, shelf-life, storage and care instructions, and other product specifications including volume and weight, and manufacturer's/packer's name and address.

Details of import regulation can be obtained from the Hong Kong Government, Department of Heath at Wu Chung house, 18th Floor, 213 Queen's Road East, Wanchai, Hong Kong.

C The Health Department also provides hotline for import regulation enquiries at (852) 2380-2580.

The Hong Kong market for fruit juice is small, and not expected to grow in the near future.

C New market entrants often consider the Hong Kong market as a "stepping stone" for entry into the much larger China market

C For non-major suppliers, the Hong Kong market alone is not sufficient to sustain a profitable go-it-alone operation

Despite the depressing market sentiments, American fruit juice suppliers should be encouraged that USA products are being perceived as high quality, which should be fully taken advantage of to further expand market share at the expense of the declining local producers' market position.

C As local producers do not produce fresh fruit juices directly from fruit, marketing and promotion programs should emphasize on the quality and health advantages of fresh fruit juices

A potential appear to exist in mixed citrus/non-citrus juices as they are currently not available in the market.

C This 'vacant spot', even if occupied, is not expected to occupy a significant portion of the market

Further market size declines are expected in 1998 and 1999 with some fruit juice consumers switching to mineral water and health drinks.

As operating costs remain high in Hong Kong, caution should be exercised to ensure a stable portion.

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Swire-Coca Cola Ltd
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Tel: (852) 2636-7888
Fax: (852) 2635-1014

Hong Kong Beverage Manufacturers' Association
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Fax: (852) 2840-0789

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Fo Tan, Shatin, NT, HK
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Fax:(852) 2691-7199

Yeo Hiap Seng Ltd
8/F Evergain Center
28 On Muk Street, Shatin
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Tel: (852) 2686 0288

Custom and Excise Department
6th - 9th Floors, Harbour Building
38 Pier Road, Central
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Tel: (852) 2852-3324

Dah Chong Hong, Ltd
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Vitasoy Ltd
1 Kin Wong Street
Tuen Mun, NT, HK
Tel: (852) 2466-0333
Fax: (852) 2465-1008

List of Important Government Web Sites and E-Mail Addresses

Department	Web Site	E-Mail Address
Census and Statistics Department	http://www.info.gov.hk/censtatd/	genenq@censtatd.gcn.gov.hk
Company Registry	http://www.info.gov.hk/cr/	crenq@cr.gcn.gov.hk
Consumer Council	http://www.consumer.org.hk	cc@consumer.org.hk
Financial Secretary's Office Business and Services Promotion Unit	http://www.info.gov.hk/bspu/	bspuenq@bspu.gcn.gov.hk
Economic Services Bureau	http://www.info.gov.hk/esb	esbuser@esb.gov.hk
Trade and Industry Bureau	http://www.info.gov.hk/tib/	--
Department of Health Headquarters Clinical Genetic Service Government Virus Unit Special Preventive Program	 http://www.info.gov.hk/dh/index.htm -- -- http://www.info.gov.hk/health/aids	 dhenq@dh.gcn.gov.hk cgs@hk.super.net wllim@hk.super.net aids@health.gcn.gov.hk
Industry Department	http://www.info.gov.hk/id	industry@id.gcn.gov.hk
Trade Department	http://www/info.gov.hk/trade	dcsm@trade.gcn.gov.hk
Hong Kong Trade Development Council	http://www.tdc.org.hk	hktdc@tdc.org.hk